Personal Things/Personal Money: Discharge or Death

Purpose:

The purpose of this memo is to give providers guidelines about what a provider should do with an individual's things and money at the time there is a new provider or when the individual passes away if it has been decided, through assessment and writing it in the Individual Service Plan, that the provider will be responsible for or assist the individual with handling his or her things and money.

Upon moving, ending services or getting a new provider, the provider shall do the following:

1. 1.Notifications
   a) A licensed facility must, in the event of discharge, follow the requirements of Ohio Administrative Code 5123:2-3-05.
   b) A provider of services in an unlicensed setting must give the individual, guardian, and Service and Support Administrator 30 days' notice to stop services.
   c) An individual receiving services may stop services at any time by telling the provider and the Service and Support Administrator of his/her decision to stop services.

2. Personal Things
   a) Complete a final list of the individuals' things within 30 days of the end of services using the Department
   b) Make plans for the individual, guardian, Service and Support Administrator, or Responsible Agent to pick up the individuals' things within 30 days of ending services.
   c) Take sure that the person picking up the individual's things signs the final list (One copy for the provider, one copy for the person picking up the things).

3. Personal Money
   a) Release the individuals' money, taking out what is owed by the individual, at the time services end. If the individual ends services, the provider has 14 days from the date he/she is told to release funds.
   b) Provide the individual or guardian with a final itemized statement of the individuals' money and any left-over personal money within 30 days of ending services.

Death of an Individual:

At the time of death, the Responsible Agent shall:

1. Tell the Department of Job and Family Services, if the individual received Medicaid, that the individual has passed away.
2. Make sure that any left-over benefits are returned to the Department of Job and Family Services.
3. Contact the Probate Court to decide any necessary legal action to be taken.
4. Make decisions regarding who gets the individuals' things.
5. Make decisions regarding who gets the individual's money.

At the time of death, the Payee shall do the following (if there is no Payee, the Responsible Agent shall be responsible):

1. Tell Social Security that the individual has passed away.
2. Make sure that left-over money is returned to the Social Security Administration.

At the time of death, the provider shall do the following:

1. Notifications
   a) Tell the guardian, family, next of kin, Service and Support Administrator and/or responsible agent immediately (within 4 hours) of the individual's death.
   b) In the event that the provider is the Payee, tell the Social Security Administration.

2. Personal Things
   a) Complete a final list of the individuals belongings within 14 days of death, using the Department Recommended form (attached).
   b) Make arrangements for the administrator of the estate, family members, or Responsible Agent to pick up the individuals' things within 30 days of death.
   c) Make sure that the person obtaining the individual's things signs the final list (One copy for the provider and one copy for the person getting the things)
   d) Complete a final list of all medications within 24 hours.
   e) Unused medication must be thrown away within 7 days per the provider's disposal policy or returned to the pharmacy.
      i. In the event that the medication is returned to the pharmacy, the provider must obtain a receipt from the pharmacy for the returned medications.
      ii. If the medication is thrown away by the provider, documentation of the disposal must be kept and signed by the person throwing away the medication and one witness.